

October 2014

Airlines in the Gulf - Saudi Arabia

“Looking at the coming decade, it appears probable that the frenetic pace of growth of the MEB3 [Middle East Big 3] has reached its limits, which will doubtless oblige the major full-service Gulf carriers to seek more extensive collaboration with other airlines. Meanwhile, the region’s LCC sector is just getting ...

Beauty Devices - UK

“Expense is the biggest barrier to purchase in this category, and despite the availability of money-back guarantees, women show interest in trial periods and special offers to avoid a hefty initial outlay. Additionally, beauty devices are seen as time-consuming and taking up space which could cause issues particularly for younger ...

Cereal Bars and Breakfast Biscuits - Ireland

“Cereal bar brands should look to the US market for NPD inspiration with regard to protein-rich launches. With Irish consumers keen to see more protein-packed bars, such developments could add value to the overall category.”

– **Sophie Dorbie, Research Analyst**

Cheese - China

“Brands should prioritise the young consumer market (both consumers in their 20s and children) to cultivate cheese consumption habits. In the adult market, cheese for snacking is an opportunity.”

– **Hao Qiu, Research Analyst**

Cheese - US

“Cheese remains a popular food for its versatility, nutritional benefits, and variety of flavors and formats. While the general category trend is toward natural cheeses, and consumers still have concerns about the nutritional value of processed cheese, they still are eating it and sales have not suffered terribly.”

Attitudes to Advertising - Ireland

“The Irish advertising sector is showing signs of recovery, however while online advertising provides a welcome fillip to advertising expenditure, it serves to mask declining expenditure in other media. Going forward, brands and advertisers will continue to face the challenge of engaging Irish consumers whose attention is increasingly being competed ...

Bedrooms and Bedroom Furniture - UK

“As prices of homes rise many people find themselves living in smaller homes with a shortage of space. They want their rooms to be multi-functional, used for a home office, surfing the net or watching TV and as they are spending more time using the rooms this drives demand for ...

Cheese - Canada

“Making conveniently-packaged cheese more widely available in venues such as gyms, yoga studios and health clubs could help to boost usage in this potentially lucrative post-exercise occasion.”

– **Carol Wong-Li, Senior Analyst**

Cheese - UK

“The ending of milk quotas post-2015 should bring challenges and opportunities for the market, particularly for British brands. Meanwhile, openness to new formats and trading consumers into territorials should help build category value.”

– **Richard Ford, Senior Food and Drink Analyst**

Cleaning Habits of Young Adults - UK

“With independence, in terms of moving away from the parental home, comes greater responsibility for household cleaning matters, so this is an important time for household care brands to engage with young adults through communications about the latest time-saving

– ...

Clothing Retailing - Europe

This report series covers the 19 leading economies of Western Europe. In total these countries account for around 95% of all European retail sales, excluding Russia.

Clothing Retailing - Germany

The focus of this report is clothing specialists, because these are the dominant players in the sector. In this report we provide total consumer spending data for clothing, which includes expenditure through all channels. And we include Mintel's Channels of Distribution estimates for Germany, which indicate how this spending ...

Clothing Retailing - Spain

The focus of this report is clothing specialists, because these are the dominant players in the sector. In this report we provide total consumer spending data for clothing, which includes expenditure through all channels. And we include Mintel's Channels of Distribution estimates for Spain, which indicate how this spending ...

Consulting Engineers (Industrial Report) - UK

“The prospects for UK consulting engineers improved during 2013 and the market is set for sustained growth over the next five years. The more buoyant construction sector is expected to boost demand in the UK. Transport infrastructure and the energy sector will provide the strongest growth potential, making up the ...

Consumers and the Economic Outlook: Quarterly Update - UK

“The revival in confidence has stalled. Although the economy is picking up speed, the population as a whole

cleaning products or equipment, as well as advice and ideas on ...

Clothing Retailing - France

The focus of this report is clothing specialists, because these are the dominant players in the sector. In this report we provide total consumer spending data for clothing, which includes expenditure through all channels. And we include Mintel's Channels of Distribution estimates for France, which indicate how this spending ...

Clothing Retailing - Italy

The focus of this report is clothing specialists, because these are the dominant players in the sector. In this report we provide total consumer spending data for clothing, which includes expenditure through all channels. And we include Mintel's Channels of Distribution estimates for Italy, which indicate how this spending ...

Clothing Retailing - UK

“As consumers increasingly want more regularly updated clothes, it is becoming more important for retailers to find improved ways of dealing with the challenges of getting clothes to market at an ever quicker pace.”

– **Tamara Sender, Senior Fashion Analyst**

Consumer Attitudes Towards Lunch Out-of-Home - UK

“Despite improvements in the UK economy, household budgets remain squeezed and therefore consumers are still cautious. The onus is thus on operators to proactively provide consumers with additional reasons to visit their venues more frequently and/or increase spend per head when they do visit.”

– **Helena Childe, Senior ...**

Cooking Enthusiasts - US

“The recession fueled a surge in cooking at home as a way to save money. As the economy improves, brands must work to retain newly minted cooking enthusiasts and encourage consumers overall to cook at home.

isn't feeling the benefit of the recovery. People are as likely to say that they feel worse off than they did a year ago as they are to say that their finances ...

Copa do Mundo e Jogos Olímpicos - Atitudes dos Brasileiros em Relação a Grandes Eventos - Brazil

"É provável que os brasileiros nunca mais tenham a oportunidade de vivenciar outra Copa do Mundo e Jogos Olímpicos realizados no Brasil, com um intervalo tão curto entre eles. Estas competições representam uma oportunidade única para o Brasil mostrar sua capacidade de sediar eventos caros e de grande porte. Entretanto ...

Dark Spirits - US

"Dark spirits, whiskey in particular, have managed to grow sales fairly strongly in recent years, yet they remain far from routine in consumers' alcohol-consumption routines. Flavor innovation is drawing the interest of some consumers, but such efforts may be overshadowed by the rush of RTD alcoholic beverages."

Digital Trends - Canada

"Tablets have proven to be more popular devices when it comes to watching videos or reading news online – suggesting that manufacturers could benefit from partnering with content providers in these industries to offer consumers discounted hardware when they sign up for a new media subscription (eg to Netflix, The ...

Energy Industry (Industrial Report) - UK

"Although the UK electricity and gas supply market continues to be dominated by the 'big six' energy firms, smaller suppliers have gained market share - reaching an estimated 8% in mid-2014. Smaller competitors have been successful in attracting customers from the larger players by offering better value prices tariffs or by ...

European Retail Briefing - Europe

Mintel data suggest that though saving money is an important driver for cooking, there ...

Cruises - UK

"Cruise ships will continue on their evolutionary path from ships to hotels-at-sea to floating destinations, becoming as much a focal point as the places visited, with operators hoping that customers will be willing to trade some of the itinerary for a better on-board experience. This is a difficult balancing act ...

Dark Spirits and Liqueurs - UK

"While whisky brands seek to make themselves more accessible to a wider pool of users through encouraging mixability and flavoured expressions, operators in the rum category are seeking to carve out a place at the premium and super premium tiers with aged expressions"

– Douglas Faughnan, Senior Food & Drink ...

Domiciliary Care (Industrial Report) - UK

"Domiciliary care services have always been preferred to other forms of care, especially for elderly people, as remaining in their own home and being able to have as much control over their own lives as possible maintains their independence. Recent high-profile care home scandals, highlighted by Panorama investigations and reinforced ...

Ethnic Trends in Restaurants - US

"The ethnic foods operator is caught between trying to offer authentically ethnic foods while catering to an audience that wants to exert control over every aspect of their dining experience. Consumers indicate they are looking for new food experiences, but are anxious about not knowing enough about a menu item's ...

Exercise Trends - US

The European retail briefing provides commentary, data and news analysis from across Europe ensuring that you keep in contact with the latest retail news.

“Exercise participation rates continue to be relatively stagnant in the US, despite an increase in obesity. Creating more customized programs, especially for the aging population, can help to increase likelihood of exercising. In addition, wearable fitness devices are a huge opportunity within the fitness landscape.”

– Emily Krol, Health ...

Fish and Shellfish - US

“The US fish and shellfish category grew moderately between 2009 and 2014, reaching \$16.7 billion, and is expected to continue growing at this pace into 2019, reaching \$20.1 billion. Sales are largely driven by consumer perceptions that fish and shellfish are healthier than other meats, although consumers surveyed ...

Fitness Clothing - US

“The lines between fitness wear and casual wear are blurring as more consumers want clothing options to reflect their busy lifestyles. The number one reason people say they buy fitness clothing is actually not so they can work out in it, but rather so they can “hang out” in it ...

Fragrances - Brazil

“Brazilian fragrance wearers are experiencing a developing category, and are able to choose between national and imported products that are available either online, at physical stores, or through catalog sales representatives. These consumers are mostly interested in new launches and new brands. The category posted gains of approximately R\$ 7 ...

Fragrâncias - Brazil

“Os perfumes importados têm a preferência dos consumidores de idade madura e/ou meia idade, com alto grau de conhecimento/envolvimento com a categoria. Isso ocorre porque, esses consumidores veem os importados como sendo de qualidade superior, algo que os nacionais, até agora, parecem pouco preocupados em demonstrar a eles ...

Fruit and Vegetables - US

“Respondents report that only 16% of their daily food intake consists of vegetables and 16% consists of fruit, which is far less than the share of plate for these foods recommended by the USDA’s MyPlate nutritional guide. Brands and grocers have an opportunity to increase the appeal of their fresh ...

Health Cash Plans - UK

“Mintel’s research shows that just 7% of non-HCP owners said that they had never heard of the product. This represents an excellent level of product awareness, but the opinions about premiums suggest that insurers are failing to either get their price message across, or to make full use of their ...

Hispanic Consumers and Property and Casualty Insurance - US

“Hispanic consumers value personal relationships making the role that insurance agents play in building a relationship and offering support very important; as they reach Hispanics with a consulting attitude rather than a sales approach, they may be able to gain their trust and anticipate the questions that Hispanics may have ...

Holiday Booking Process - China

“Operators have started to expand their portfolios considerably either from online services or physical entity into mobile apps platform. Today mobile sites and apps are being designed to feature simple and fast search and booking tools, backed up by attractive options such as one-off deals and mobile-exclusive promotions.

Hotels - UK

Hotels - US

“Decreasing levels of interaction between hotels and guests could result in low levels of engagement, limited opportunities to build loyalty and also limited opportunities to drive incremental revenue. In the long-term, this coupled with a shift towards bookings through intermediaries could contribute towards a commodification of the hotels market, where ...

Lifestyles of Millennials - UK

“Traditional advertising has largely failed to capture imaginations of younger audiences, and advertisers need to step up creativity to sustain their appeal to Millennials. Funny and creative campaigns have the most potential for capturing the attention of younger consumers and winning their longer-term loyalty.”

– Ina Mitskavets, Senior Lifestyles ...

Luxury Cars - US

“Luxury car sales have been strong, but seasoned marketers know that any brand is only as good as its next sale. Marketers have an opportunity to sustain the next generation of luxury buyers with impressive ongoing service, next-gen technology, and the possibility of a more comfortable car buying process.” – ...

Manned Security (Industrial Report) - UK

"Building in services additional to guarding, which exploit intelligence gathered from integrated electronic systems could help to improve sales for specialist firms facing a competitive threat from facilities management operators"

– Ben Harris, Industrial Analyst

Men's Toiletries - China

“Men tend to shop for the toiletry products when they have skin problems to solve. In addition, they expect instant product efficacy in personal care. Brands should take efforts to further educate Chinese male consumers, in terms of the motivation of usage, expectation of the product and the product usage ...

Mobile Apps - US

“The relatively stable and growing economy of the past couple of years has given consumers the confidence to resume taking vacations and overnight trips. However, competitors to traditional lodgings, like airbnb.com, have emerged that can both threaten the existing players and grow the overall market.”

– Fiona O'Donnell ...

LSR: Sandwiches, Subs and Wraps Concepts - US

“The issues that sandwich, sub, and wrap concepts face stem from the versatility of the product itself. While consumers are clearly more than willing to go to a sandwich shop to eat, they can easily make a sandwich at home, go to a burger place, or skip out on the ...

Luxury Retailing - China

"The luxury retail market in China has undergone significant changes in a short period of time, and continues to change rapidly. Growth has slowed down due to the government's anti-extravagance campaign, forcing luxury brands to adapt their brand and product portfolios to better suit the diversifying needs of consumers."

Men's Personal Care - US

“The men's personal care category is expected to grow steadily due to men's continued reliance on personal care staples, such as APDO and shaving products, which have traditionally been segmented by gender. Companies can accelerate market growth by encouraging men to trade up to male-specific products that offer them new ...

Men's Toiletries - UK

“Post-recession, the male toiletries consumer remains intent on saving money on day-to-day purchases, and fashion trends continue to stunt certain markets such as shaving and hair removal. As a result the market has plateaued, however a number of opportunity areas exist for brands such as catering to a tween audience ...

Mobile Device Apps - UK

“The majority of mobile app users do not download paid apps, while the abundance of free apps now available has filled mobile marketplaces with a plethora of options. Getting consumers engaged with an app is only half the battle – drawing revenue from that engagement may be an even greater ...

Music Concerts and Festivals - UK

“With companies like Live Nation promoting thousands of concerts and festivals each year, or AEG having such a strong position in London in terms of the sheer number of major venues that it operates, there is the potential for promoters to offer a season ticket, which could be used mainly ...

Pay TV and Home Communication Services - US

“The pay TV market is frequently rebuked for not giving consumers what they want. Meanwhile, the industry is effectively moving to give consumers what they want, while also growing profits.”

– **Billy Hulkower, Senior Analyst, Technology and Media**

Personal Care Consumer - US

“Personal care consumers are becoming more informed and skeptical, and are demanding transparency, simplicity, and efficacy when shopping for and using personal care products.”

– **Shannon Romanowski, Senior Beauty and Personal Care Analyst**

Poultry - UK

“Social media offers a potential channel for operators to convey the high standards of living of their poultry, eg through video footage. Elements of gamification, which enable consumers to interact with poultry, can help to generate interest in their welfare.”

– **Emma Clifford, Senior Food Analyst**

Red Meat - UK

“In the short term, in the UK at least, developers on iOS will likely earn more money than those on competing app stores. In the longer term though, porting any content to Android should be a priority; not least because Google is strongly pushing into emerging markets under the Android ...

Online Gaming and Betting - UK

“Political and public pressure for new restrictions on television gambling ads comes at an opportune moment for an industry looking to wean itself off free money promotions and move to more sophisticated marketing strategies around brand, product and experience.”

Payments - US

“The payments world is rapidly changing as technology designed to make paying for merchandise easier is introduced every day. However, the challenge to the industry remains the same as it has always been: are consumers really looking to buy what the payments industry is trying to sell?”

– **Robyn Kaiserman ...**

Poultry - Ireland

“Cooking from scratch continues to be an important trend in the wider food industry, and suppliers of unprepared poultry products stand to benefit, with Irish consumers seeing poultry as a versatile ingredient that can be included in any number of different types and styles of cuisine.”

– **Brian O'Connor ...**

Ranges, Ovens, Cooktops and Microwaves - US

“While external economic factors are lifting the category as a whole, manufacturers and retailers can gain competitive advantage by catering to a wide variety of lifestyle needs. For many, especially aging Boomers, healthy, fresh eating is an increasingly compelling concern. Younger adults, on the other hand, may see a new ...

Roadside Catering - UK

“Cost remains a barrier for the red meat market, creating growth opportunities for cheaper cuts. However, over half of youngsters say that uncertainty about how to cook cheaper cuts puts them off buying them. Positioning cheaper cuts as an economical and ethical choice, along with educating the consumer as to ...

Roofing Materials (Industrial Report) - UK

“Market conditions for roofing materials and contractors notably improved as the year progressed in 2013, and 2014 is witnessing a substantial increase in demand. The magnitude of the growth in 2014 is not sustainable, but increases in demand will continue to be a market feature over the next five years ...

Saudi Arabia Outbound - Saudi Arabia

“Saudi Arabian outbound travel is a dynamic market that is transforming at great speed, yet remains conservative in many ways. The Saudi Arabian economy has grown rapidly in recent years, buoyed by its rising population, growing middle class and high levels of consumer expenditure.”

- **Jessica Rawlinson, Senior Tourism Analyst**

Share Dealing - UK

“Consumers can find share dealing daunting at first. This presents a barrier, preventing some would-be investors from entering the market. Providers need to make the application process as clear, simple and jargon free as possible, and should use technology to make this happen.”

- **Alex Hiscox, Senior Analyst** – ...

Social Media and Financial Services - US

“Social media is an integral part of consumers’ life. However, with all the brands and companies maximizing on social media to engage consumers, there is a battle for the consumer’s attention. Being late in the game, financial services companies can make a difference by understanding the needs and habits of ...

The prevalence of major fast food providers, such as McDonald’s and Burger King, and traditional preconceptions about the quality of the food served in them, has meant that roadside outlets have become synonymous with unhealthy, lower-quality foods. Going forward, roadside service stations and restaurants could alter this perception and bolster ...

Sabonetes e Produtos para o Banho - Brazil

“A penetração dos sabonetes em barra no mercado brasileiro já é alta, portanto o crescimento da categoria de sabonetes e produtos para banho pode ser impulsionado por outros segmentos que possuam índices menores de penetração, como sabonetes líquidos e gel de banho. Os consumidores mais jovens usam mais estes tipos ...

Security Equipment (Industrial Report) - UK

“Manufacturers will need to protect their position from new entrants in the technology sector as the penetration of wireless security systems increases, while product development is expected to continue at a rapid pace.”

- **Ben Harris, Industrial Analyst**

Soap, Bath and Shower Products - Brazil

“Bar soaps already have high penetration rates, suggesting growth in the category can come from other segments with lower penetration rates, such as liquid soaps and shower gels. Younger consumers already use these types of products more, as they are more open to changes and innovations. It is just a ...

Still, Sparkling and Fortified Wine - UK

“The scope to increase value sales is limited by the heavy promotional activity that is both accepted and expected by shoppers. Therefore, other avenues such as clearer information about the differences between more and less expensive wines and the opportunity to sample wines before buying may be better placed to ...

The Importance of Brands in Technology - China

“Chinese consumers see technology brands they use as a reflection of desired lifestyles. What brands need to do is to understand consumer behaviour, build unique brand value, communicate through storytelling and establish a binding relationship that shares a sense of identity.”

– **Can Huang, Senior Research Analyst**

TV Service Providers - UK

“Die-hard sports fans are unlikely to ditch TV subscriptions anytime soon, however, others may well be tempted to as subscription-free services improve, smart TVs enter more homes and more people use paid video streaming services.”

– **Paul Davies, Senior Leisure and Technology Analyst**

Vacation Trends - Canada

“Given their preference for booking last-minute vacations, it is important for deal or booking sites to provide Quebecers with the ability to research, review and book trips in their native tongue, which is typically French Canadian.”

– **Jason Praw, Senior Lifestyle Analyst**

Wine - Brazil

“Brazil has a wide range of high-quality and award-winning wines, but its consumption is still relatively low compared to other alcoholic beverages, such as beer. By using the expertise of the beer category – the most popular alcoholic drink among Brazilians – wine producers could help boost sales of the ...

World Cup and Olympic Games - Brazilian Attitudes towards Major Events - Brazil

“People may never witness another World Cup and Olympic/Paralympic Games in Brazil in their lifetime, particularly so close in time to each other. These events represent an unparalleled opportunity for Brazil to show its ability to host such large and expensive events to the world. They must pay off ...

Tubes and Pipes (Industrial Report) - UK

“As a mature sector, albeit one where material substitution has been a major feature in the last few years, market conditions for tubes and pipes notably improved as the year progressed in 2013. Moreover, 2014 is witnessing further growth, as expectations of continued market development have now replaced the stop-start ...

UK Retail Briefing - UK

Each month Mintel’s UK Retail Briefing concentrates on a particular sector or market. This month’s provides analysis of the E-commerce sector.

Vinho - Brazil

“Para aumentar o consumo de vinhos no Brasil, é possível estimular novos usos do espumante, ainda muito percebido como uma bebida somente para ocasiões especiais. Comunicar benefícios da categoria relevantes às mulheres, como vinhos mais suaves, e aos consumidores acima de 45 anos, como atributos de saudabilidade, também podem contribuir ...

Wine - US

“While indications point to an advantage for off-premise merchandisers, shifts in the market, including the expansion of sales locations, are making the wine retail landscape increasingly competitive. While this is good news for the category, growing the reach of wine, it’s requiring sellers to adopt more creative sales models.” ...

假日预订流程 - China

“今非昔日，随着中国游客更常旅游出行，他们不再只是匆匆赶去景点购物拍照。旅游假日对于他们而言是逃离忙碌生活、释放压力的方式。他们更享受舒缓愉悦的假日，在目的地待上更长时间以充分领略当地文化和美食。这种‘慢旅行’和体验式度假生活已悄然兴起。此外，许多繁忙的旅游者青睐通过更高效快速的方式计划、预订假日，而不是被淹没在大量的在线信息中。因此，旅行社可以利用定制旅游信息或假日旅游套餐以满足中国游客不断变化的需求。”

奢侈品零售 - China

“中国奢侈品零售市场在短期内发生了翻天覆地的变化，这股势头将持续保持强劲。由于政府倡导“反浪费”运动，导致增长势头有所放缓。然而，奢侈品市场的变化早已悄然而至，这促使奢侈品牌改变在华策略，从而更好的满足消费者多样化的需求。”

男士护理品 - China

“男士在出现皮肤问题需要解决的时候才会购买护理产品。他们还希望个人护理产品能快速起效。在使用动机、产品期望和产品使用方面，品牌应努力推进对中国男性消费者的教育。还有重要的一点是，品牌在与男性消费者沟通时应时刻注意男性和女性之间的差异。”

— 李浏铃，高级研究分析师

奶酪 - China

“中国奶酪市场在过去五年里经历了从规模甚小到快速增长的过程。尽管总体市场仍然由非零售业务主导，奶酪的零售市场也在不断升温中，2009年到2014年的零售销量以37%的年均复合增长率增长。展望未来，中国的奶酪零售市场将继续以两位数的比率增长，增长主要由消费者对奶酪产品了解的不断增多，以及一线城市之外的消费者对奶酪产品更容易获取来推动。”

科技领域中品牌的重要性 - China

“中国消费者对科技的接受度非常高，也愿意在科技产品和服务上花钱。他们在科技和通信方面的开支比例大，表明他们的参与度非常高。因此，所有科技品牌都有可能从这可迅猛发展的市场中获得丰厚利润，这也是为什么市场上有丰富的国内和国际公司存在。”